

TRISM IV

User Manual



OUR PLEDGE

**No cardholder shall leave
the new accounts desk
without a working debit card
in their hand. Period.**

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What is TRISM IV?

TRISM IV is the latest card issuance suite developed by DemoTeller Systems, Inc. This unique hardware and software system provides all the tools needed for the creation and distribution of financial cards of any kind.

Initially introduced in the late 1990's, TRISM provides instant and central issuance of Visa® and Mastercard® credit and debit cards to financial institutions worldwide.

TRISM works seamlessly with the PCI-certified and listed Hardware Security Module (HSM) to ensure complete privacy of cardholders' information.

From centrally issued, pre-printed cards to customer created cards available for immediate use, TRISM IV boasts the versatility to meet any institution's most specific demands.

TRISM IV Desktop Icons



TRISM Manager



HSM Manager



Card Designer



Server



Print Controller

Configure

General

The screenshot shows a configuration window for TRISM IV. It contains several fields and a group box. Five numbered callouts are present:

- 1. Points to the "Days until Password is Expired" field, which contains the value "90".
- 2. Points to the "Pin Pad Derivation Key Location" field, which contains the value "6".
- 3. Points to the "Pin Pad Session Expiration in days" field, which contains the value "1".
- 4. Points to the "Update File Location" field, which is empty. A "Choose Directory" button is located to the right of this field.
- 5. Points to the "Citrix Force Port" checkbox, which is checked. To its right is a group box labeled "Per User" containing two dropdown menus: "Per User" and "Entire System".

At the bottom of the window are "OK" and "Cancel" buttons.

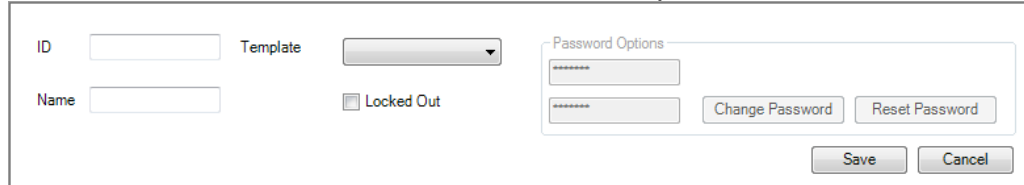
1. All TRISM IV user passwords will expire after the amount of days specified. New passwords for each user must be created at that time. (Disregard if Windows Active Directory is enabled)
2. The PIN pad derivation key is provided by DSI for setup of the HSM. It can be found in HSM Manager in the Key Management tab.
3. If an old version of a PIN pad is being used that does not automatically generate an encryption key, a new encryption key will be generated by T4 after the specified amount of days.
4. Click **Choose Directory** and select the location where TRISM updates will be saved.
5. Check box if using a Citrix virtual server and select the assigned port from the dropdown menu. Ports do not need to be assigned per user if they are assigned for the entire system.

Users

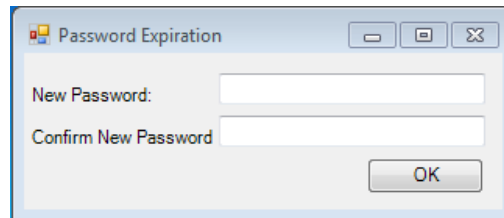
The following user configuration is disabled if Windows Active Directory is enabled.

Add Users

To add a new user, select **Users** from the left-hand Configure menu. Click **Add**, and enter the user information in the provided fields.

A form for adding a new user. It includes fields for ID, Name, and Template (a dropdown menu). There is a checkbox for 'Locked Out'. A 'Password Options' section contains two password input fields (both masked with asterisks), 'Change Password', and 'Reset Password' buttons. At the bottom right are 'Save' and 'Cancel' buttons.

When the new user logs in, they must use the default password **1234567**. When **Login** is clicked, a window will open prompting the user to change their password. All passwords must be at least 8 characters long and include at least three of the following: capital letters, lowercase letters, numbers, and special characters (!@#\$\$%^&*).

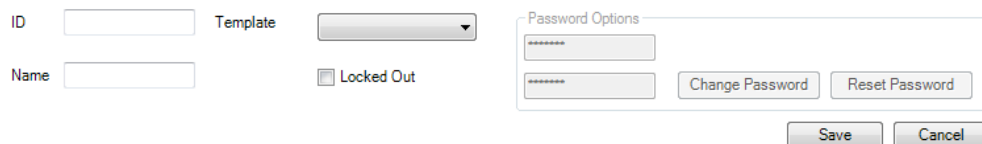
A dialog box titled 'Password Expiration'. It has two input fields: 'New Password:' and 'Confirm New Password:'. Both fields are currently empty. An 'OK' button is located at the bottom right of the dialog.

Enter the new password in the provided fields and click **OK**. The user will then be redirected to the TRISM IV main menu.

Alternatively, users may be entered using the Active Directory function.

Edit Users

Select a user in the User list and click **Edit**. Make the desired changes and click **Save**.

A form for editing an existing user. It includes fields for ID, Name, and Template (a dropdown menu). There is a checkbox for 'Locked Out'. A 'Password Options' section contains two password input fields (both masked with asterisks), 'Change Password', and 'Reset Password' buttons. At the bottom right are 'Save' and 'Cancel' buttons.

Templates

A template may be used to automatically assign a user a specific set of permissions. See the Appendix for permission descriptions.

ID	Name	
Admin	Admin	
Template 1	Template 1	
Template 2	Template 2	
Template 3	Template 3	
Template 4	Template 4	
Template 5	Template 5	

To enable or disable permissions, select **Template** from the Configure menu to display the following menu:

Select a template and click **Edit**.

Each of the options in the above menu will open a list of permissions that may be enabled and disabled by clicking their respective check boxes.

The screenshot shows a software interface for configuring security permissions. On the left, a tree view lists various system components: Security, Order Cards, Queue, Reports, Inventory, Configure, PCLink, and Trism. 'Security' is currently selected. On the right, a panel titled 'Template Name' shows 'Template 1' selected in a dropdown menu. Below this, there are three checkboxes, all of which are currently unchecked: 'Edit Security Template', 'Edit Security Permissions', and 'Enable PC Users'.

Template options example: Security permissions

See the Appendix for permission descriptions.

Formats

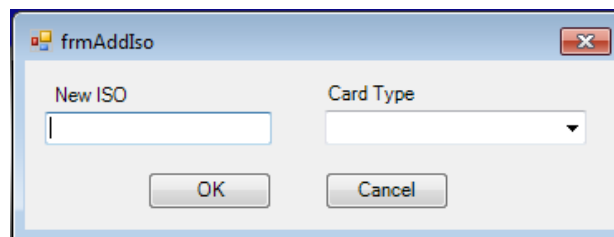
Card types (e.g. Mastercard, Visa, Visa EMV, etc.) are added in the Formats menu.

Card and mailer formats can also be edited in the Formats menu to customize placement of text and pictures.

Number	Name	BIN
1	BLANK VISA	123456
2	BLANK MASTERCARD	654321
3	BLANK VISA EMV	999999
4	ATM	555555

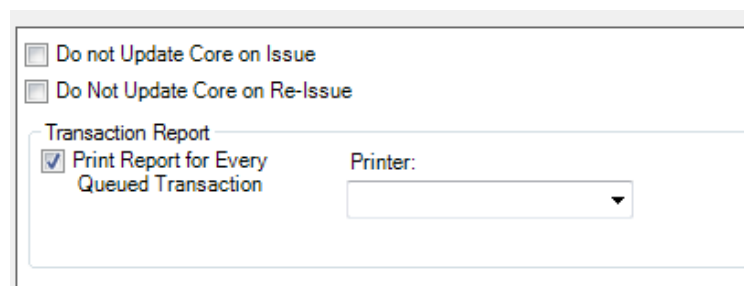
Add Edit Copy Delete

To add a card type, click **Add**. Enter the card's ISO or BIN number and select the card type. Click **OK**.

A dialog box titled 'frmAddIso' with a close button (X) in the top right corner. It contains two input fields: 'New ISO' (a text box) and 'Card Type' (a dropdown menu). Below these fields are two buttons: 'OK' and 'Cancel'.

General Settings

The following menus are displayed by selecting a card type and clicking **Edit**.

A dialog box titled 'General Settings' with a close button (X) in the top right corner. It contains two checkboxes: 'Do not Update Core on Issue' and 'Do Not Update Core on Re-Issue'. Below these is a section titled 'Transaction Report' which contains a checked checkbox 'Print Report for Every Queued Transaction' and a 'Printer:' dropdown menu.

The branch's core will be updated on every issue or reissue unless the above check boxes are selected.

To make hard-copy records of all queued transactions, including ordered cards and re-PINs, check the box in the **Transaction Report** section and select a printer.

Encode Settings

The Encode Settings determine the information and placement of information written to the cards' magnetic stripe.

Format: 1 Card Type: ATM

Name	Index From	Start	Length	Order	Default
Format Code	SS	0	1	1	B
Card Number	SS	1	16	2	123456#####
Name	1st FS	0	26	3	
Expiration D...	2nd FS	0	4	4	4912
Service Code	2nd FS	4	3	5	120
Member Nu...	2nd FS	7	1	6	1
Offset	2nd FS	8	4	7	0000
			0	8	
			0	9	
			0	10	

To edit these settings, double-click the field to be changed to display the following window:

Field Name: Format Code Index From: SS Start: 0 Length: 1

Data: B

OK Cancel

Click **OK** when editing is completed.

☐ Enable Auto Card Number Generation.

Auto Card Number

Beginning Card Number: Current Card Number:

ISO: 123456

Increment By:

☒ Allow Name Change

Name Options

Customer's name will be encoded in the following format

Lastname/Firstname Middle

Allow Name Change on the following Transactions

☒ Re-Pin

☒ Select A Pin

Card numbers may be generated automatically by TRISM in the **Auto Card Number** menu. Check the **Enable Auto Card Number Generation** box to edit card number settings.

Enter the first card number used as the **Beginning Card Number**. Cards will print with numbers beginning after the **Current Card Number**.

Mailers

The screenshot shows a configuration window titled "Mailers". It contains two main sections: "Print Card Mailer" and "Print Pin Mailer". Each section has a "Card Mailer" or "PIN Mailer" sub-section. In the "Print Card Mailer" section, there is a checkbox for "Use MSWord Mail Merge", a "Template File" field with a "Browse" button, and a "Printer" dropdown menu. The "Print Pin Mailer" section has similar fields for "Use MSWord Mail Merge", "Template File", and "Printer". Additionally, it includes checkboxes for "Calc Natural PIN", "Print Return Address", and "Trism Sets PIN Mailer Form size (3 7/8" X 8 7/8")".

Print Card Mailer or Print PIN Mailer: Enables printing of mailers upon card print.

Use MSWord Mail Merge: Use mailer templates from Microsoft Word documents.

Calc Natural PIN: Automatically generate a PIN for which the offset is 0000. When this is not enabled, the offset will be determined based on a randomly generated PIN.

Print Return Address: Include the branch's address on the PIN mailer.

Photo Settings

Configure .xml files, card number layout, photo ID's, custom backgrounds, and signature fields.

General

The screenshot shows a configuration window titled "Photo Settings". It has a "Format Creates a printed Card" section with a "Use Single Template" checkbox, a "Template Directory" field with a "Browse" button, and a "File Name" field. Below this is a "Template Parameters" section with checkboxes for "Track 1 Data + Track 2 Data", "Print Bin", "Print Exp. Date", "Print Full Name", "Print Misc1", "Print CVV2", "Print Last 4", and "Print Business". To the right is a "Card Number Printing" section with radio buttons for "No Spaces", "Masked Card Number" (selected), and "Use Alt. Mask" (with a masked number example). Below that is a "Template Options (Use Names from the Options)" section with checkboxes for "Photo", "Background" (checked), "MiddleName", "Signature", "FirstName", and "LastName". At the bottom are "Original Card Inventory" and "Default Embosser" dropdown menus.

Setting Image Gallery Location

By the Template Directory Field, click **Browse**. The image gallery should be located in a folder with a name matching the branch ID, within the specified card type folder. For example: \\Server Name\\Images\\Card Type\\Branch ID

Template Parameters and Template Options

Check the fields that the card format .xml file contains.

Card Number Printing

No Spaces: Select for 18-digit cards to disable spacing between numbers

Masked Card Number: Separate a 16-digit card number into 4 blocks of 4 digits

Use Alt. Mask: Enter a string of “#” signs consistent with the desired spacing of card digits.

Advanced

☐ Format uses a Photo

Photo ID

Photo ID Path

Naming Convention of Photo

Additional Properties. Use as directed.

~MASK=CARDNUMBER

Height Width

☒ Aspect ☐ Fixed

☒ Allow Custom Backgrounds

Background

☒ User can choose background

Background Path

C:\Backgrounds\Custom

☐ Format uses a Signature

Signature

Signature Path

Naming Convention of Photo

Additional Properties. Use as directed.

Photo ID

Check **Format uses a Photo** for photo ID cards to enable the Take Photo button when ordering a card.

Click **Browse** and navigate to the folder containing the photo ID files.

Naming Convention of Photo: Photo ID images will be saved with a file name of one the following card properties:

Naming Convention of Photo

CARDNUMBER

MEMNUM_SSN

SSN

LAST5

MISC1_MISC2

MEMNUM_LAST5

BIN_LAST5

BIN4_LAST5

BIN7_MEM_LAST5

BINLAST5

BINLAST5SSMEMNUMI

BIN_LAST5SS_MEMNU

These file names will be automatically masked, indicated in the Additional Properties field by the prefix “~MASK=”.

Additional Properties. Use as directed.

~MASK=CARDNUMBER

Custom Background

Check **Allow Custom Backgrounds** to enable the Personalize button while ordering cards. This is intended for customer-provided images.



To set the location of the custom backgrounds, click Browse and navigate to the folder in which the backgrounds will be saved.

Signature

Check **Format Uses a Signature** if the card stock contains a signature box. Click **Browse** to navigate to the folder containing the signature images.

Card Status

The card status for each format will be chosen in the Order Card Job Information panel. For example:

New

Re-Issue

Replacement

Devices

The Devices tab displays a list of all printers and embossers configured with TRISM.

Device License Allowed: 5
Device License Used: 1

Index	Name	Address	Port	Ping Test
1	Default Printer	192.168...	7575	

Buttons: Add, Edit, Delete, Add Device License, License Device, Rebuild Devices

Each device must be licensed.

Once a license code is obtained, click **Add Device License**.

Add License

Current Installed License: 13

Extended License Code

Buttons: Install, Cancel

Enter the license code. Once a valid code has been entered, click **Install**. The Device License Allowed value will increase by the number of licenses linked to the license code.

Adding a printer or embosser

1. Install the printer according to manufacturer instructions.
2. Open the DSI Print Service Controller located in C:\Program Files\Demoteller.

Log File Service About

Service Setup

IP: 192.168.1.51 (selected), 192.168.1.51, 127.0.0.1, 7575

☒ Enable

Installed Printers: Jeff HDPII

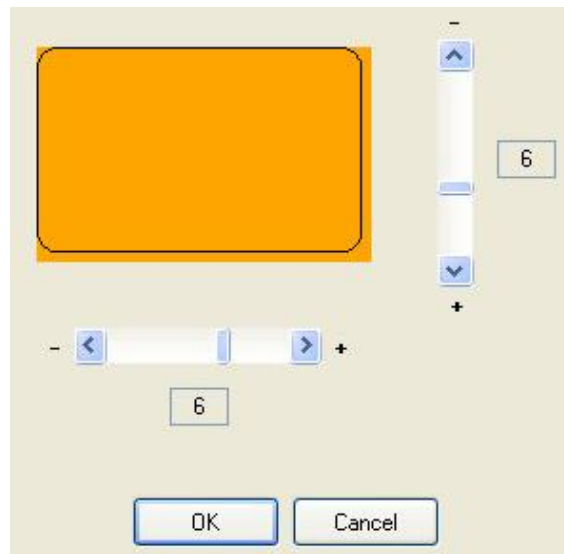
Startup Delay: 0 seconds

Printer Properties

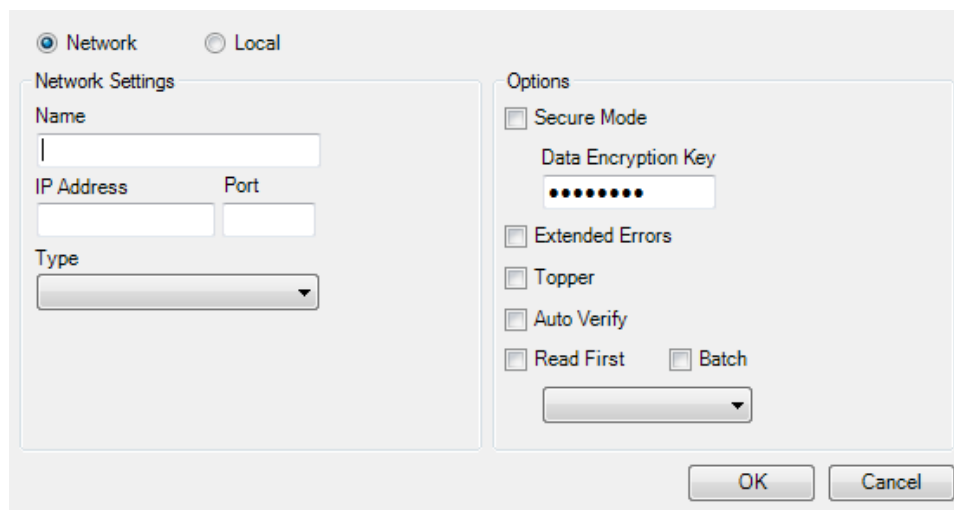
FARGO_HDPII (selected)

Buttons: Card Size, Print Size, Save Settings, Exit

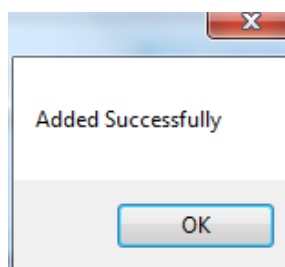
3. Select the internal IP address (IP computer being used is on)
4. Enter the port assigned to the printer
5. Check Enable
6. Select the printer from the Installed Printers dropdown menu
7. Unless otherwise recommended, keep the Startup Delay at 0 seconds
8. Select the printer type from the Printer Properties dropdown menu. If your printer type is not listed, select "Other".
9. Click Print Size. Set the length and width to 6, then click OK. Do not change the Card Size unless otherwise specified.



10. Click Save Settings, then exit.
11. In the TRISM 4 Devices window, click **Add**.
12. If the printer will be accessed via network or wireless connection, select **Network**.



13. Enter the printer's name, IP address, port, and type (photo printer, embosser).
14. **If an embosser is being used**, select the desired options from the **Options** menu:
 - Secure Mode: enter embosser's data encryption key to encrypt information sent to embosser
 - Extended Errors: View a detailed log of any embosser errors
 - Topper: Check if a foil topping will be imprinted on card numbers and names
 - Auto Verify: After a card is printed, it will be verified that it has printed correctly automatically. This is recommended when printing large quantities of cards.
 - Read First: If a printer encodes information on a card's magnetic stripe prior to embossing, checking Read First enables the embosser to use that information to determine what is embossed on the card.
15. When all required information has been added, click **OK**.



An unlicensed device will be highlighted in red. Select the device from the Devices list and click **License Device**.

2	Unlicensed Device			
---	-------------------	--	--	--

A licensed device will be highlighted in blue.

1	Default Printer	192.168...	7575	
---	-----------------	------------	------	--

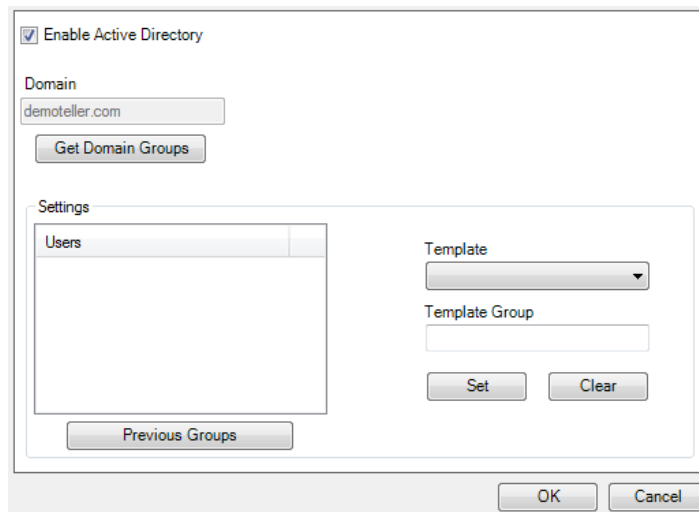
16. Click **Rebuild Devices** after adding, deleting, or changing a device.

Active Directory

All users part of a network's Active Directory may be automatically entered in TRISM. If Active Directory is enabled, usernames and passwords cannot be changed using TRISM IV. The computer in use must be part of a domain, **not a workgroup**. If the computer is part of a workgroup, do not change any active directory settings.

When Active Directory is enabled, the only non-active directory logins that may be used are:

Access1
Installer1
Installer2



Check the **Enable Active Directory** box. TRISM IV will automatically search for and enter the domain name.

Click **Get Domain Groups** to display all groups in the Users window.

Select a group in the Users window and choose a template from the dropdown menu.

Click **Set** to save the template to the selected domain group.

The domain group selected will appear in the Template Group field.

Branches

Each branch must be licensed. One free branch license will be included with TRISM 4. Additional licenses may be purchased from DSI.

The screenshot shows a window titled 'Branches' with the following elements:

- Branch License Allowed: 16
- Branch License Used: 1
- Buttons: 'Add Branch License' and 'License Branch'.
- A table with two columns: 'BranchID' and 'Branch Name'. The first row is 'Central' and 'Central Branch', which is highlighted in blue.
- Buttons: 'Add', 'Edit', and 'Delete' at the bottom.

BranchID	Branch Name
Central	Central Branch

Once a license code is obtained, click **Add Branch License**.

The screenshot shows a dialog box titled 'Add License' with the following elements:

- Current Installed License: 13
- Extended License Code: (text input field)
- Buttons: 'Install' and 'Cancel'.

Enter the license code. Once a valid code has been entered, click **Install**. The Branch License Allowed value will increase by the number of licenses linked to the code. Select an unlicensed branch highlighted in red and click **License Branch**. A licensed branch will be highlighted in blue.

Add and remove vaults, devices, and PCs

Select a branch and click **Edit**. Click **Add** under Vaults, devices, or PCs and enter the name of the new vault, device, or PC. Select an existing vault, device, or PC and click **Remove** to remove a branch.

The screenshot shows three side-by-side windows: 'Vaults', 'Devices', and 'PC's'. Each window has a table with a 'Description' column and 'Add' and 'Remove' buttons at the bottom.

Description

Interfaces

Interface Settings

Interface settings and values will be determined by each individual interface and generally not edited by financial institution personnel.

General
Users
Templates
Formats
Devices
Active Directory
Branches
Interfaces
 Interface Settings
 Interface Bin Settings
MSR

DSI Portico Int 4.0

Setting	Value
BRANCHID	000
CREDITUNIONID	22222
LOGGINGMAX	100
LOGGINGMIN	0

Edit

StockName	StockQualifier
Blank white	654321

Add Edit Delete

OK Cancel

Interface BIN Settings

Interface BIN settings determine what actions may be performed by each BIN. Interface BIN settings and values will be determined by each individual interface and generally not edited by financial institution personnel.

General
Users
Templates
Formats
Devices
Active Directory
Branches
Interfaces
 Interface Settings
 Interface Bin Settings
MSR

Interface
GUtils

Bin
222456

Setting	Value
Deposits	Y
Inquiries	Y
PaymentsFrom	Y
PaymentsTo	Y
Purchases	Y
ThirdPartyPayment	Y
TransfersFrom	Y
TransfersTo	Y
Withdrawals	Y

Edit

OK Cancel

MSR

Magnetic stripe readers (MSRs), if used, must be licensed and linked to PIN pads.

The screenshot shows a software interface for managing Magnetic Stripe Readers (MSRs). On the left is a navigation tree with the following items: General, Users, Templates, Formats, Devices, Active Directory, Branches, Interfaces, and MSR (which is selected and highlighted in blue). The main area displays the MSR configuration. At the top, it shows 'MSR License Allowed: 21' and 'MSR License Used: 2'. To the right of these counts are two buttons: 'Add MSR License' and 'License MSR'. Below this is a table with four columns: Index, PinPad Serial Number, IP Address, and MSR Used. The table contains four rows of data, with rows 9, 10, 11, and 12. Rows 9 and 11 are highlighted in blue, while rows 10 and 12 are highlighted in red. Below the table are three buttons: 'Delete PinPad', 'Test/Find MSR', and 'Release MSR'. At the bottom right of the window are 'OK' and 'Cancel' buttons.

Index	PinPad Serial Number	IP Address	MSR Used
9	817284E7B0331BE0		Yes
10	817284E7B030F8E0		No
11	817284E7B030BAE0		Yes
12	817284E7B02AB8E0	192.168.1.38	No

Adding MSRs

Click **Add MSR License** and enter the license code obtained from DSI.
Click **Test/Find MSR**. The MSR will appear on the table highlighted in red.
Select the MSR and click **License MSR**. The MSR will now be highlighted in blue.

Moving an MSR to another computer:

Select the MSR to remove and click **Release MSR**.
When the MSR is plugged in to the new computer, click **Test/Find MSR**.

Inventory

The TRISM IV Inventory system features a dual control login to ensure security.

The image shows a login window for the TRISM IV system. It has a blue background with the text "TRISM IV" in large, stylized letters at the top. Below the title, there are two input fields: "Dual Control login ID" and "Password". To the right of the "Dual Control login ID" field is a "Login" button. To the right of the "Password" field is a "Cancel" button.

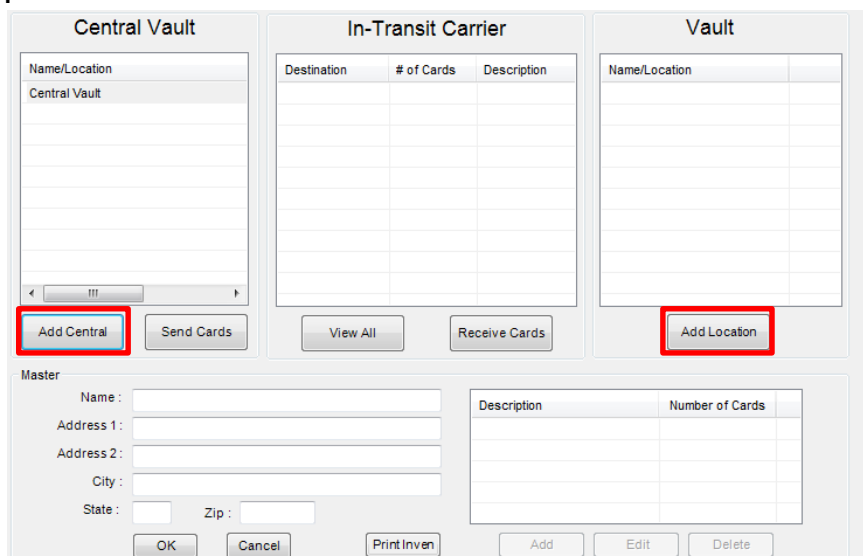
When an inventory is selected, a login window will open. Another user with inventory privileges (not the user currently logged in) must enter their username and password to gain access to inventory controls.

Vault Inventory

The vault inventory tracks the shipment of stock cards between the central vault and vaults at each branch.

Adding vaults

Click **Add Central** or in the Central Vault display or **Add Location** in the Vault display.

The image shows the Vault Inventory interface. It is divided into three main sections: "Central Vault", "In-Transit Carrier", and "Vault". The "Central Vault" section has a table with "Name/Location" and "Central Vault" as the only entry. Below the table is a red box around the "Add Central" button and a "Send Cards" button. The "In-Transit Carrier" section has a table with columns "Destination", "# of Cards", and "Description". Below the table are "View All" and "Receive Cards" buttons. The "Vault" section has a table with "Name/Location" and "Add Location" as the only entry. Below the table is a red box around the "Add Location" button. At the bottom, there is a "Master" section with fields for "Name", "Address 1", "Address 2", "City", "State", and "Zip". To the right of these fields is a table with columns "Description" and "Number of Cards". At the bottom of the "Master" section are "OK", "Cancel", "Print Inven", "Add", "Edit", and "Delete" buttons.

Enter the required name and address fields. Click **OK**.

Tracking cards

The screenshot displays a web interface for tracking cards, divided into three main sections: Central Vault, In-Transit Carrier, and Vault.

- Central Vault:** Contains a table with 'Name/Location' and 'Central Vault' (callout 1). Below the table are 'Add Central' and 'Send Cards' buttons.
- In-Transit Carrier:** Contains a table with columns 'Destination', '# of Cards' (callout 6), and 'Description'. Below the table are 'View All' and 'Receive Cards' buttons.
- Vault:** Contains a table with 'Name/Location' and an 'Add Location' button.

Below these sections is a 'Send Cards to a Branch' form:

- Callout 2 points to the 'Send To' dropdown menu.
- Callout 3 points to the 'Carrier Name' input field.
- Callout 4 points to the 'Description' table, which has columns 'Description' and 'Number of Cards'. The first row shows 'Blank White' and '489'.
- Callout 5 points to the 'Send' button.

Other form elements include 'Number of Cards' and 'Comments' input fields, and a 'Cancel' button.

Sent Cards

1. Select a central vault. Click **Send Cards**.
2. Select the recipient branch's vault from the **Send To** dropdown menu.
3. Enter the Carrier Name, number of cards to send, and any additional comments.
4. Select the type of cards stock to send.
5. Click **Send**.
6. The shipment order will display under the **In-Transit Carrier** menu.

Received Cards

Select the received order under the **In-Transit Carrier** menu and click **Receive Cards**. The order will be removed from the In-Transit Carrier menu and the cards will be added to the vault inventory.

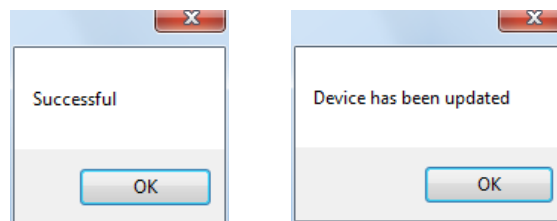
Device Access

Adding/removing cards and changing ribbon/foil

Each time a printer or embosser is opened, it must be accounted for in the Device Inventory.

The screenshot shows a web-based form for managing device inventory. It includes dropdown menus for Branch, Vault, Device, and Card Stock. There are input fields for Current Quantity, Add, and Remove. Checkboxes for Topping Foil Destroyed and Indent Foil Destroyed are present. Reason and Description dropdowns are also included. A section for Unlock Device has a checkbox and a dropdown menu. The form ends with Process and Cancel buttons. Numbered callouts 1 through 9 point to specific fields: 1. Branch, 2. Vault, 3. Device, 4. Card Stock, 5. Current Quantity, 6. Topping Foil Destroyed, 7. Reason, 8. Unlock Device dropdown, 9. Process button.

1. Select the branch in which the device is located.
2. Select the vault containing the cards or foil.
3. Select the device to be opened.
4. If adding or removing cards, select card stock.
5. Enter the quantity of cards to add or remove, if any.
6. If opening an embosser to change topping and/or indent foil, check the corresponding boxes.
7. Enter a reason for opening and a description of the actions performed, or choose a reason and description from the dropdown menus. If adding or removing card stock, the reason will be generated automatically.
8. Select a time delay for unlocking the device. Longer delays should be used if the device is not near the workstation.
9. Click Process.



Card Stock Inventory

Card Stock ID

To add different card stocks to the inventory menus, enter the new card stock's ID and description in the provided fields.

Card Stock ID	Card Stock Description	EMV
123-860	Blank Visa	<input type="checkbox"/>
569865	Green Pre Printed	<input checked="" type="checkbox"/>
abc123	EMV card	<input checked="" type="checkbox"/>

Card Stock ID: Card Stock Description: State: ☐ EMV

Select whether the card should be printed readily, paused, or manually in the **State** menu.

Check the **EMV** box if the card stock has an embedded EMV chip.

Click **Add** once the above information has been entered.

Card Stock to BIN

To set the BIN number to be printed on each card stock type, select the desired

Card Stock Description	BIN / ISO
Blank Visa	222456
EMV card	222456
Green Pre Printed	123456

Select CardStock:

Select BIN / ISO:

card stock in the drop down menu. Select the BIN in the drop down menu, then click **Add**.

Card Stock to Device

Select Vault

Card Stock ID	Card Stock Description	Device	State

Select Card Stock

Select Device

State

Remove

Add

Track the addition of certain card types to printers and embossers.

Select the vault that contains the card stock to be added or removed, then select the card stock from the drop down menu. Select the printer or embosser in which card stock is added or removed, then click **Add** or **Remove**.

Request

Order Card

Search <input type="text" value="Portico"/> <input type="text" value="Member Number"/> <input type="text" value="Search Criteria"/> <input type="button" value="Search"/>	Image Selection <input type="text" value="Select a gallery card"/> <input type="button" value="Personalize"/>	Job Information <input type="text" value="Print"/> <input type="text" value="Default Printer"/> <input type="text" value="New"/> <input type="text" value="Select Job State"/> <input type="text" value="Central Vault"/> <input type="text" value="Select Mailer"/> <input type="button" value="Order Card"/>
Card Information <input type="text" value="2 Visa Debit"/> <input type="text" value="222456"/> <input type="button" value="Get Card #"/> <input type="text" value="Select Card Stock"/> <input type="text" value="Cardholder Name"/> <input type="text" value="Business Name"/> Exp. Date <input type="text" value="02/17"/> Offset <input type="text" value="0000"/> <input type="button" value="Get PIN"/> PIN Method <input type="text" value="PinPad"/>		
Address Information <input type="text" value="Address 1"/> <input type="text" value="Address 2"/> <input type="text" value="City, State Zip"/> <input type="text" value="Country"/> <input type="text" value="Misc"/>	Security Information <input type="text" value="Mother's Maiden Name"/> <input type="text" value="Date of Birth"/> <input type="text" value="SS# / Tax ID"/> <input type="text" value="Drivers License"/> <input type="text" value="Misc. Data 1"/> <input type="text" value="Misc. Data 2"/>	Contact Information <input type="text" value="Phone Number 1"/> <input type="text"/> <input type="text" value="Phone Number 2"/> <input type="text"/> <input type="text" value="Phone Number 3"/> <input type="text"/> <input type="text" value="Phone Number 4"/> <input type="text"/> <input type="text" value="Email"/>
Account Information <input type="text" value="Primary Checking"/> <input type="text" value="Primary Savings"/> <input type="text" value="Secondary Checking"/> <input type="text" value="Secondary Savings"/> <input type="text" value="Misc. Account"/> <input type="text" value="Member Number"/>		

Search

If a core or processor interface is being utilized, select the interface from the dropdown menu.

If the customer is existing, choose to search by either card or member number. Enter the card or member number in the Search Criteria field.

Click Search.

Select the desired member from the list. The member's information will be automatically populated in the blank fields.

Card Information

Select the card BIN in the Product dropdown menu.

Click Get Card # to automatically generate the card number (if Auto Card Number is enabled in the BIN's format settings), or enter it manually.

Select the card stock from the drop down menu.

Enter the customer's name, business name (if desired), and the card's expiration date, if not automatically generated.

Click Get PIN. The PIN pad will beep. Enter the desired PIN on the PIN pad. Press the green Enter button.

The PIN pad will beep again. Re-enter the PIN and press the green Enter button to confirm the PIN.

The card's offset will be displayed after the PIN is entered.

Address, Security, Contact, and Account Information

If not generated by a core or processor interface, enter the member's information in the blank fields.

Job Information

Select items from the following dropdown menus:

Job Information	
Print	Print or Emboss
Default Printer	Printer
New	New, Re-Issue, or Replacement
Select Job State	Ready, Manual, or Paused
Central Vault	Vault
Select Mailer	Print PIN and/or Card Mailers

*Ready: Prints immediately

Manual: Prints when card is inserted into machine

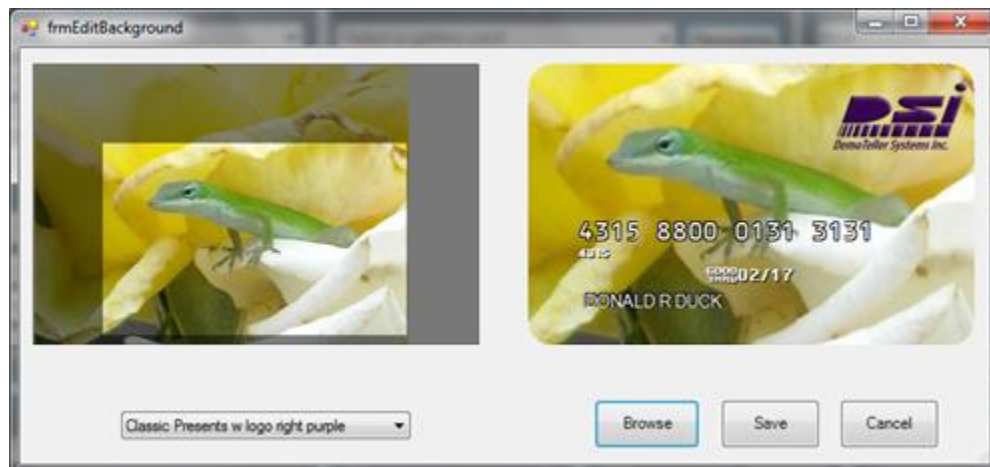
Paused: Prints when card status is changes to Ready in the queue

Personalizing and Previewing Cards

In the Image Selection box, choose a galleried image from the dropdown menu.

To insert a logo or choose a member-provided image, click Personalize.


Click **Browse** and navigate to the folder containing the custom image.



Select the image and click **Open**.

To crop the image, click and drag an area on the image on the left. To insert a logo, select a logo color and position from the dropdown menu. Click **Save** when personalization is complete.

Click **Back** to preview the back of the card.
Click **Order Card** to send the card to the queue.

Search	Image Selection	Job Information	
<div>Portico</div> <div>Member Number</div> <div>719299</div> <div>Search</div>	<div>Select a gallery card</div> <div>Personalize</div> <div></div> <div>Back</div>	<div>Print</div> <div>Default Printer</div> <div>New</div> <div>Paused</div> <div>Central Vault</div> <div>Select Mailer</div> <div>Order Card</div>	
<div>Card Information</div> <div>5. Visa Port</div> <div>4315880001313131</div> <div>Get Card #</div> <div>Blank White</div> <div>DONALD R DUCK</div> <div>MICKEY MOUSE</div> <div>Exp. Date</div> <div>02/17</div> <div>Offset</div> <div>4265</div> <div>Get PIN</div> <div>PIN Method</div> <div>PinPad</div>			
<div>Address Information</div> <div>555 MOBY LANE</div> <div></div> <div>FRISCO, TX 750340000</div> <div></div> <div></div>	<div>Security Information</div> <div></div> <div>12:00:00 AM</div> <div>878752125</div> <div></div> <div></div> <div></div>	<div>Contact Information</div> <div>8009004545</div> <div></div> <div>0000000000</div> <div></div> <div></div> <div></div> <div>Email</div> <div></div>	<div>Account Information</div> <div>75</div> <div>01</div> <div></div> <div></div> <div></div> <div>719299</div>

Edit Permissions

The Edit Permissions window allows a user to make certain fields in the Order Card window editable or required. The fields with editable permissions are highlighted in yellow.

The screenshot shows the 'Edit Permissions' window with several sections:

- Search:** Search Provider (dropdown), Search By (dropdown), Search Criteria (text input), Search (button).
- Card Information:** Select Product (dropdown), Card Number (text input), Select Card Stock (dropdown), Cardholder Name (text input, highlighted yellow), Business Name (text input, highlighted yellow), Exp. Date (text input), Offset (text input, highlighted yellow), Get PIN (button), PIN Method (dropdown).
- Image Selection:** Loading... (dropdown), Personalize (button).
- Job Information:** Select Job Type (dropdown), Select Device (dropdown), Select Card Status (dropdown), Select Job State (dropdown), Select Vault (dropdown), Order Card (button).
- Address Information:** Address 1 (text input, highlighted yellow), Address 2 (text input, highlighted yellow), City, State Zip (text input, highlighted yellow), Country (text input, highlighted yellow), Misc (text input, highlighted yellow).
- Security Information:** Mother's Maiden Name (text input, highlighted yellow), Date of Birth (text input, highlighted yellow), SS# / Tax ID (text input, highlighted yellow), Drivers License (text input, highlighted yellow), Misc. Data 1 (text input, highlighted yellow), Misc. Data 2 (text input, highlighted yellow).
- Contact Information:** Phone Number 1 (dropdown), Phone Number 2 (dropdown), Phone Number 3 (dropdown), Phone Number 4 (dropdown), Email (text input, highlighted yellow).
- Account Information:** Primary Checking (text input, highlighted yellow), Primary Savings (text input, highlighted yellow), Secondary Checking (text input, highlighted yellow), Secondary Savings (text input, highlighted yellow), Misc. Account (text input, highlighted yellow), Member Number (text input, highlighted yellow).

Right click a field and select **Is Editable** to enable input of text.

The screenshot shows a right-click context menu over the 'Address 3' field. The menu options are 'IsEditable' (selected with a checkmark) and 'IsRequired'.

Right click a field and select **Is Required** to make a field mandatory. If no information is entered in a mandatory field, when Order Card is clicked a red icon will appear next to the field.

The screenshot shows the 'Image Selection' section. The 'Select a gallery card' dropdown menu is empty. A red error icon is visible next to the 'Personalize' button, indicating a mandatory field is not filled.

A card may not be printed until all required fields are filled. Dropdown menus may not be designated as editable or required.

Re-PIN

The screenshot shows the Re-PIN interface with the following sections and callouts:

- Search:** Callout 1 points to the 'ico' dropdown menu. Callout 2 points to the 'Search' button.
- Card Information:** Callout 3 points to the 'Select Product' dropdown. Callout 4 points to the 'PIN Method' dropdown. Callout 5 points to the 'Get PIN' button. Callout 6 points to the 'Offset' field.
- Image Selection:** Callout 7 points to the 'Repin' button.
- Job Information:** Includes dropdowns for 'Select Job Type', 'Select Device', 'Select Card Status', 'Select Job State', and 'Central Vault'.
- Address Information:** Includes fields for 'Address 1', 'Address 2', 'City, State Zip', 'Country', and 'Misc'.
- Security Information:** Includes fields for 'Mother's Maiden Name', 'Date of Birth', 'SS# / Tax ID', 'Drivers License', 'Misc. Data 1', and 'Misc. Data 2'.
- Contact Information:** Includes fields for 'Phone Number 1' through 'Phone Number 4' and 'Email'.
- Account Information:** Includes fields for 'Primary Checking', 'Primary Savings', 'Secondary Checking', 'Secondary Savings', 'Misc. Account', and 'Member Number'.

1. Select Card Number or Member Number in the dropdown menu, then enter the customer's card or member number in the Search Criteria field.
2. Click **Search**. Results will be displayed in the bottom of the window.
3. Double click to select the desired card number.

Search Results							
Cardnumber	Name	Account1	Account2	Expiration	Offset	Card St...	Card Iss...
4315880002234547	GOOFY D DOG	75	01	02/17	2695	1	Created
4315880004524947	TWEETY N BIRD	75	01	02/17	1551	1	Created
4315880002211117	MINNIE A MOUSE	75	01	02/17	8291	1	Created
4315880001313131	DONALD R DUCK	75	01	02/17	4265	1	Created
4315880004526434	BETTY BOOP	75	01	02/17	7623	1	Created
4315880009900049	SYLVESTER CATZ	75	01	02/17	2159	1	Created
4315880009994949	POPEYE B STRONG	75	01	02/17	2892	1	Created

4. Select the PIN Method. **PinPad** will allow the customer to manually enter the new PIN on the PINPad. **Generate** will automatically generate a new PIN.
5. Click **Get PIN**. If using the PIN Pad to enter the PIN, the PIN pad will beep. Enter the desired PIN on the PIN pad. Press the green Enter button. The PIN pad will beep again. Re-enter the PIN and press the green Enter button to confirm the PIN.
6. The card's offset will be displayed after the PIN is entered.
7. Click **Repin** to update the card record.

PIN Mailer

A PIN Mailer may be printed in this window if one is not printed at the time of card creation.

1. Enter the customer's member number in the Search Criteria and click **Search**.

The screenshot shows the PIN Mailer form with the following sections and annotations:

- Search:** A dropdown menu is set to "Portico". A circled "1" points to the "Member Number" field, which contains "719299". A "Search" button is next to it.
- Image Selection:** A "Loading..." dropdown and a "Personalize" button.
- Card Information:** A dropdown menu is set to "2. Visa Debit". Below it are fields for "2224564315880009", "Select Card Stock", "SYLVESTER CATZ", "MICKEY MOUSE", "Exp. Date" (02/17), "Offset" (2159), and "PIN Method" (PinPad). A "Get PIN" button is next to the Offset field.
- Job Information:** A series of dropdown menus: "Select Job Type", "Default Printer", "Select Card Status", "Select Job State", and "Central Vault".
- Address Information:** Fields for "555 MOBY LANE", "FRISCO, TX 750340000", and other address details.
- Security Information:** Fields for "12:00:00 AM", "878752125", and other security details.
- Contact Information:** Fields for "8009004545", "0000000000", and "Email".
- Account Information:** Fields for "75", "01", and "719299".
- A circled "3" points to the "Print Mailer" button in the bottom right corner.

2. Select the desired card number to populate the customer information.

Search Results

Cardnumber	Name	Account1	Account2	Expiration	Offset	Card St...	Card Iss...
4315880002234547	GOOFY D DOG	75	01	02/17	2695	1	Created
4315880004524947	TWEETY N BIRD	75	01	02/17	1551	1	Created
4315880002211117	MINNIE A MOUSE	75	01	02/17	8291	1	Created
4315880001313131	DONALD R DUCK	75	01	02/17	4265	1	Created
4315880004526434	BETTY BOOP	75	01	02/17	7623	1	Created
4315880009900049	SYLVESTER CATZ	75	01	02/17	2159	1	Created
4315880009994949	POPEYE B STRONG	75	01	02/17	2892	1	Created

3. Click "Print Mailer."

Queue

The queue displays all cards that have been ordered and have not yet printed.

<div> <input type="button" value="Refresh"/> <input checked="" type="checkbox"/> Auto Refresh <div>30 17</div> <input type="button" value="Clear"/> </div> <div> Cards In Queue: 12 <input type="button" value="Purge Requests"/> </div>									
ID	Entry Date	Device Name	Card Number	Card Type	Job Status	Card Status	Operator	Vault	B
1	1/7/2014 2:03:48 PM	Default Printer	222456*****8888	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
3	1/8/2014 11:02:32 ...	Default Printer	222456*****4165	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
6	1/8/2014 11:09:18 ...	Default Printer	222456*****6434	2. Visa Debit	Manual Ph...	Re-Issue	access1	Branch Vault	C
7	1/8/2014 11:10:49 ...	Default Printer	222456*****4895	2. Visa Debit	Paused Ph...	Re-Issue	access1	Branch Vault	C
8	1/8/2014 11:11:53 ...	Default Printer	222456*****9851	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
9	1/8/2014 11:12:39 ...	Default Printer	222456*****2152	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
10	1/8/2014 11:13:17 ...	Default Printer	222456*****8416	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
11	1/8/2014 11:14:25 ...	Default Printer	222456*****8796	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
12	1/8/2014 11:15:38 ...	Default Printer	222456*****6454	2. Visa Debit	Paused Ph...	New	access1	Branch Vault	C
2	1/7/2014 2:06:23 PM	Fargo	222456*****1111	2. Visa Debit	Ready Photo	New	access1	Branch Vault	C
4	1/8/2014 11:05:40 ...	Fargo	222456*****2222	2. Visa Debit	Manual Ph...	Re-Issue	access1	Branch Vault	C

Double-clicking an item in queue will display the Card Information:

Device Name

Hurst

Device IP Address

192.168.1.16:3000

Job Status

Trism Locked

Change Job Status

Card Number

12345*****4444

Entry Date

6/13/2013 3:06:28 PM

Format

1. BLANK VISA

Transaction Type


Print-a-Card

☐ Print Card Mailer

☐ Print PIN Mailer

Current Background

American Flag



New Background

Error Code

OK

Cancel

Change job status: ready photo, send to embosser, manual print, paused photo, or card verified.

Delete a card in the queue by selecting it and pressing the Delete key on your keyboard.

If a Card Information window is open at another workstation or branch, the card cannot be printed, deleted, or changed. Click **Purge Requests** to close all Card Information windows.

Inventory Removed: Total quantity of cards removed from vault device

Manually Added: Quantity of cards added manually during the order card process

Used Inventory: Quantity of cards not destroyed or returned to inventory;
successfully printed cards issued to customers

Cards Destroyed: Quantity of cards destroyed in the Spoil Card menu

Cards Returned to Inventory: Quantity of cards returned in the Spoil Card menu

Other Cards Removed from Inventory: Quantity of cards removed from device
not accounted for by the Spoil Card menu

Ending Device Inventory: Sum of the above quantities

Vault Inventory

Starting Vault Inventory: Quantity of cards in vault since last processed end-of-day

Vault Inventory Received: Quantity of cards received in the Vault Inventory Transfer
page

Vault Inventory Sent: Quantity of cards sent in the Vault Inventory Transfer page

Removed to Device(s): Quantity of cards added to devices in the Device Access page
(inventory menu)

Returned from Device(s): Quantity of cards removed from devices and returned to
vault

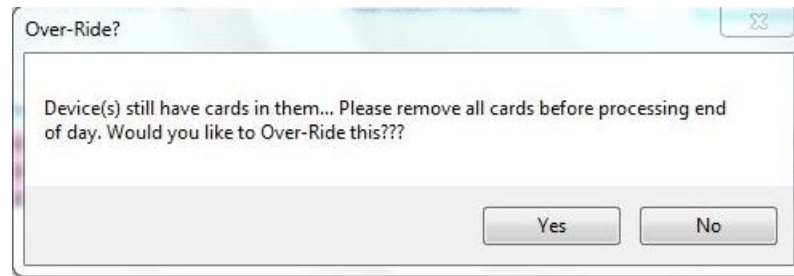
Current Vault Inventory: Quantity of cards in vault

Total Cards in Device(s): Quantity of cards in all devices

Total Branch Inventory: Sum of cards in devices and vault(s)

Device Inventory	
Starting Inventory	47
Inventory Added	0
Inventory Removed	0
Manually Added	0
Used Inventory	0
Cards Destroyed	0
Cards Returned to Inventory	0
Other Cards Removed from	
Ending Device Inventory	47

If the Ending Device Inventory and/or Total Cards in Device(s) is greater or less than zero, the following window will appear:



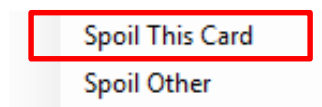
Click Yes to process End-of-Day.

Click No to return to the End-of-Day Report screen.

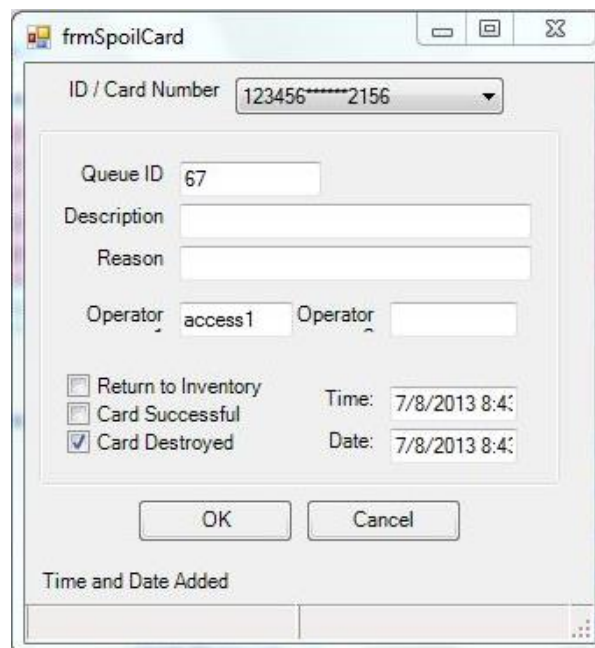
Spoil Cards

A misprinted card that cannot be issued is considered "spoiled." A spoiled card will be highlighted in red.

To give a user permission to spoil cards, click on the Configure tab. Click Templates from the left-hand menu and double-click the desired template. Select Queue from the left-hand menu, then check the box labeled **Delete Cards**. Right-click a card to display the following menu:



Select **Spoil This Card** to display the following window:



If desired, enter a description of the spoiled card and the reason for spoilage. Select from the following options:

Return to Inventory if the card is still viable for printing

Card Successful if the card was incorrectly spoiled and will be issued

Card Destroyed if the card is not viable for issuance or future printing

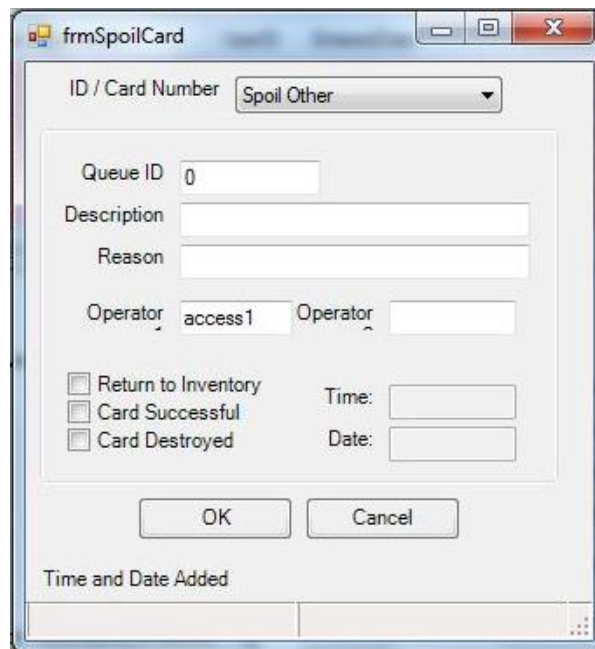
Click **OK** when finished. The card will be highlighted in red when successfully spoiled.

Spoil Other

If two cards are stuck together during printing, they must both be accounted for in the inventory.



Right click a spoiled card and select **Spoil Other**.



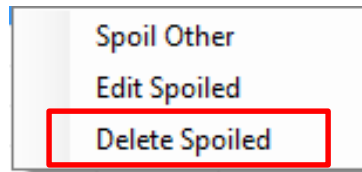
The Queue ID will display 0.

If desired, enter a description of the other spoiled card and a reason for spoiling.

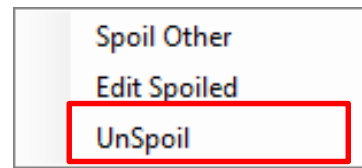
Select Return to Inventory, Card Successful, or Card Destroyed.

Click OK. The Other Spoiled Card will appear in the queue.

If a card is mistakenly added to the queue via Spoil Other, right click it in the queue and select **Delete Spoiled**.



If a card is spoiled mistakenly, right click it in the queue and select **UnSpoil** to return it to its original state.



Management

Reports with user-specified information may be created in the Management tab.

The screenshot shows the Management tab interface. At the top, there are filters for Matching (0), Start Date (6/14/2013), End Date (6/14/2013), Saved, and PreMade. Below these are four Filter dropdown menus and buttons for Search, Clear, Print, Export, and Save. The main area is a table with columns: Archive..., Backgr..., BranchID, CardNu..., CardFor..., Card M..., CardSta..., Created, Custom..., Cvv2, DeviceID, Entered..., Emboss..., and Encode... The table is currently empty.

Select the Start Date and End Date to specify a range of cards to display. The Start Date should be set one day prior to the date of card verification. Click **Search** to populate the list of cards.

To open a previously created report: select the report from the **Saved** dropdown menu.

To open a report template, select one of the following options from the PreMade dropdown menu:

Columnar Report: Prints all selected columns in specified date range

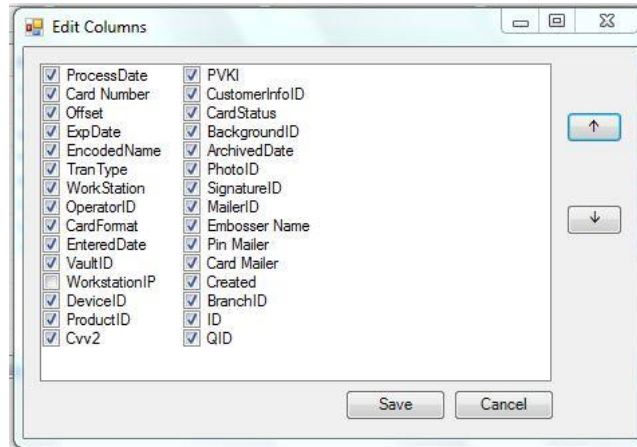
Background Report: Prints card background summary in specified date range

To create a customized report: Select which columns are printed by right clicking anywhere in the card information field and selecting **Add/Remove Columns**.

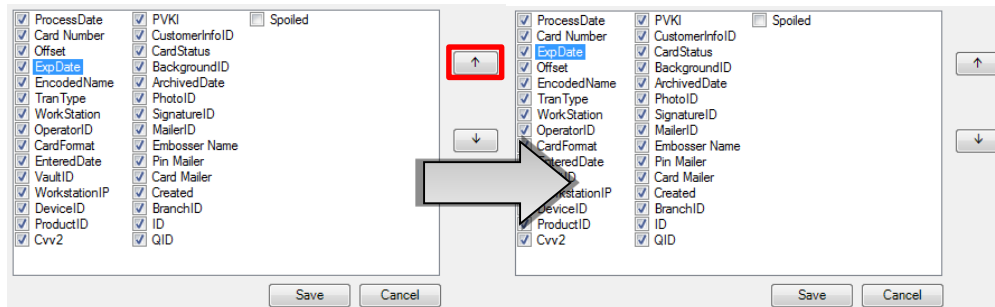
The screenshot shows the Management tab interface with a populated table. The filters are Matching (XX), Start Date (10/ 3/2012), End Date (2/14/2014), Saved, and PreMade. The table has columns: ArchivedDate, BackgroundID, Bran..., CardNumber, C., Car..., Ca..., Cre..., Custo..., and a scroll bar. The table is populated with data. A context menu is open over the table, showing options: Add/Remove Columns and Details. The 'Add/Remove Columns' option is highlighted with a red box.

ArchivedDate	BackgroundID	Bran...	CardNumber	C.	Car...	Ca...	Cre...	Custo...
12/10/2013 10:25:49 AM	2224567777777777	Central	222456*****7777	2	False	New	True	900010
1/3/2014 8:18:10 AM	Cowboys	Central	222456*****5345	2	False	New	True	900038
1/3/2014 8:18:10 AM	Cowboys	Central	222456*****4564	2	False	New	True	900043
1/3/2014 8:18:10 AM	Cowboys	Central	222456*****7890	2	False	New	True	900051
12/20/2013 10:12:40 AM	Globe Green	Central	222456*****4472	2	False	New	True	900025
1/8/2014 10:02:55 AM	American Flag	Central	222456*****8432	2	False	New	True	900070
1/3/2014 8:18:10 AM	American Flag	Central	222456*****5464	2	False	New	True	900034
1/3/2014 8:18:10 AM	American Flag	Central	222456*****6545	2	False	New	True	900041
1/3/2014 8:18:10 AM	American Flag	Central	222456*****7890	2	False	New	True	900049
12/10/2013 12:06:10 PM	Preprinted stock	Central	222456*****7890	2	False	New	True	900017
1/8/2014 10:02:55 AM	American Flag	Central	222456*****4564	2	False	New	True	900071
12/17/2013 7:57:54 AM	Cowboys	Central	222456*****6456	2	False	New	True	900021

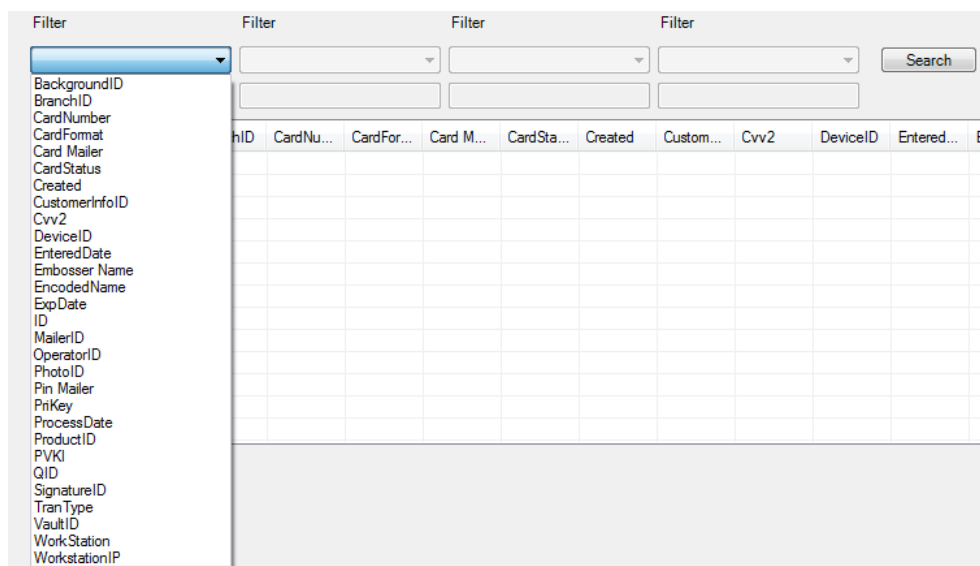
Check the desired boxes to select or deselect the columns to be displayed.



To change the column order, select a column name and click the up or down arrows.



To filter columns: Select a column field from the first Filter dropdown menu.



Enter the filter criterion in the field below (only one criterion per filter). Only one filter field is enabled initially. Following filters will be enabled once preceding filters are designated.

Click **Search** to apply the specified filters.

Reports may be saved for future use, printed, or exported in .csv format.

To view card information: Right click a card and select **Details**.

The screenshot displays a software interface for managing card data. At the top, there are filter controls including 'Matching' (set to 'XX'), 'Start Date' (10/3/2012), 'End Date' (2/14/2014), and 'PreMade'. Below these are four 'Filter' dropdown menus and buttons for 'Search', 'Print', and 'Export'. A 'Clear' button is also present. The main area contains a table with columns: 'ArchivedDate', 'BackgroundID', 'Bran...', 'CardNumber', 'C...', 'Car...', 'Ca...', 'Cre...', and 'Custo...'. The table lists various card entries with their respective dates, background IDs, branches, card numbers, and other attributes. A right-click context menu is open over the row dated '1/3/2014 8:18:10 AM' with background ID 'Cowboys'. The menu options are 'Add/Remove Columns' and 'Details', with 'Details' highlighted by a red rectangle. A 'Save' button is located at the bottom right of the interface.

ArchivedDate	BackgroundID	Bran...	CardNumber	C...	Car...	Ca...	Cre...	Custo...
12/10/2013 10:25:49 AM	2224567777777777	Central	222456*****7777	2	False	New	True	900010
1/3/2014 8:18:10 AM	Cowboys	Central	222456*****5345	2	False	New	True	900038
1/3/2014 8:18:10 AM	Cowboys	Central	222456*****4564	2	False	New	True	900043
1/3/2014 8:18:10 AM	Cowboys	Central	222456*****7890	2	False	New	True	900051
12/20/2013 10:12:40 AM	Globe Green	Central	222456*****4472	2	False	New	True	900025
1/8/2014 10:02:55 AM	American Flag	Central	222456*****8432	2	False	New	True	900070
1/3/2014 8:18:10 AM	American Flag	Central	222456*****5464	2	False	New	True	900034
1/3/2014 8:18:10 AM	American Flag	Central	222456*****6545	2	False	New	True	900041
1/3/2014 8:18:10 AM	American Flag	Central	222456*****7890	2	False	New	True	900049
12/10/2013 12:06:10 PM	Preprinted stock	Central	222456*****7890	2	False	New	True	900017
1/8/2014 10:02:55 AM	American Flag	Central	222456*****4564	2	False	New	True	900071
12/17/2013 7:57:54 AM	Cowboys	Central	222456*****6456	2	False	New	True	900021

Historical Card Balancing

Reports summarizing cards printed per branch, device, card stock, and/or operator can be printed in the Historical Card Balancing menu.

Show All

Start Date

9/24/2013

End Date

9/24/2013

Branch Name

Vault Name

Device Name

Product Name

Sales Branch

Vault 101

Fargo

Blank White

Filter

Date Archived	Operator	Device	Product ID	Branch	
9/20/2013	Sample	Fargo	Blank White	Vault 101	
9/24/2013	Sample	Fargo	Blank White	Vault 101	
9/24/2013	Sample	Fargo	Blank White	Vault 101	
9/24/2013	Sample	Fargo	Blank White	Vault 101	

OK

Cancel

Select a date range, or click **Show All**. Select the branch, vault, device, and/or product in the dropdown menus to filter by and click **Filter** to generate the historical report.

Data Log

View the log of all actions performed by third party services.

Start Date

Monday, February 24, 2014

End Date

Wednesday, March 05, 2014

DSI CardServices Int

Search

TimeStamp	Message	Assembly	Data
2/26/2014 10:33:04 AM	Legacy logging method all check dat...	DSI Por...	Entered Process
2/26/2014 10:29:07 AM	Legacy logging method all check dat...	DSI Por...	0
2/26/2014 10:29:07 AM	Number of returned cards:1	DSI Por...	
2/26/2014 10:29:07 AM	Legacy logging method all check dat...	DSI Por...	<?xml version="1.0"?><IFX><EDSPASRs><Status><StatusCode>
2/26/2014 10:28:54 AM	Legacy logging method all check dat...	DSI Por...	<?xml version="1.0" encoding="utf-16"?><IFX xmlns:xsd="http://
2/26/2014 10:28:53 AM	Legacy logging method all check dat...	DSI Por...	Entered Process
2/26/2014 10:28:53 AM	Legacy logging method all check dat...	DSI Por...	<?xml version="1.0" encoding="utf-16"?><IFX xmlns:xsd="http://
2/26/2014 10:28:14 AM	Number of returned cards:8	DSI Por...	
2/26/2014 10:28:14 AM	Legacy logging method all check dat...	DSI Por...	<?xml version="1.0" encoding="utf-16"?><IFX xmlns:xsd="http://
2/26/2014 10:28:13 AM	Legacy logging method all check dat...	DSI Por...	<?xml version="1.0" encoding="utf-16"?><IFX xmlns:xsd="http://

DSI Portico Int 4.0

Date/Time: 2/26/2014 10:28:54 AM

Priority: -1

Severity: 16

Machine Name: JEFF2012TSTSRVR

```
<?xml version="1.0" encoding="utf-16"?>
<IFX xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <SignonRq>
    <ClientDt>2014-02-26 10:28:54</ClientDt>
    <CustLangPref>English</CustLangPref>
    <SignonPswd>
    <CustId>
```

Purge

OK

Select the dates to search by in the Start Date and End Date dropdown menus, then select the service in which to view the log. Click **Search**.

Click **Purge** to delete the log.

Error Log

View the log of all errors encountered by third party services.

Select the dates to search by in the Start Date and End Date dropdown menus, then select the service in which to view the log. Click **Search**.

The screenshot shows the 'Error Log' application window. At the top, there are two date range selectors: 'Start Date' (Monday, January 27, 2014) and 'End Date' (Wednesday, March 05, 2014). Below these is a dropdown menu for 'DSI Portico Int 4.0' and a 'Search' button. The main area contains a table with columns: TimeStamp, Message, Assembly, Source, TargetS..., and Data. The table lists several error messages, all with the message 'Length cannot be less than zero. Parameter name: I...'. The entry for '3/4/2014 3:13:14 PM' is selected. Below the table, the details for the selected entry are shown: 'DSI Portico Int 4.0', 'Date/Time: 3/4/2014 3:13:14 PM', 'Source: mscorlib', 'Target: System.String - Substring', and 'Machine Name: JEFF2012TSTSRVR'. There are also sections for '---Data---', '---Inner Exception---', and '---Stack---'. At the bottom, there are 'Purge' and 'OK' buttons.

TimeStamp	Message	Assembly	Source	TargetS...	Data
3/4/2014 3:13:15 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:14 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:14 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:13 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:13 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:12 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:12 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:11 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:11 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:10 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:10 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:09 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	
3/4/2014 3:13:08 PM	Length cannot be less than zero. Parameter name: I...	DSI Portico Int...	mscorlib	System....	

DSI Portico Int 4.0
Date/Time: 3/4/2014 3:13:14 PM

Source: mscorlib
Target: System.String - Substring
Machine Name: JEFF2012TSTSRVR

---Data---
---Inner Exception---
---Stack---

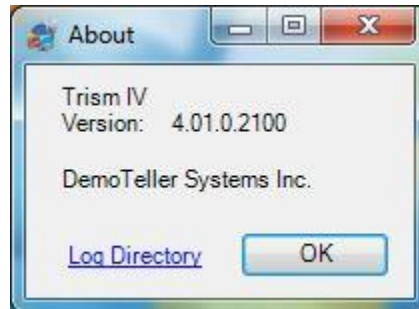
Purge OK

Click **Purge** to delete the log.

Help

About

View the version of TRISM IV currently installed.



Click **Log Directory** to view TRISM data and error logs.

Appendix

Card Layouts

Refer to the following guidelines when setting up card formats.

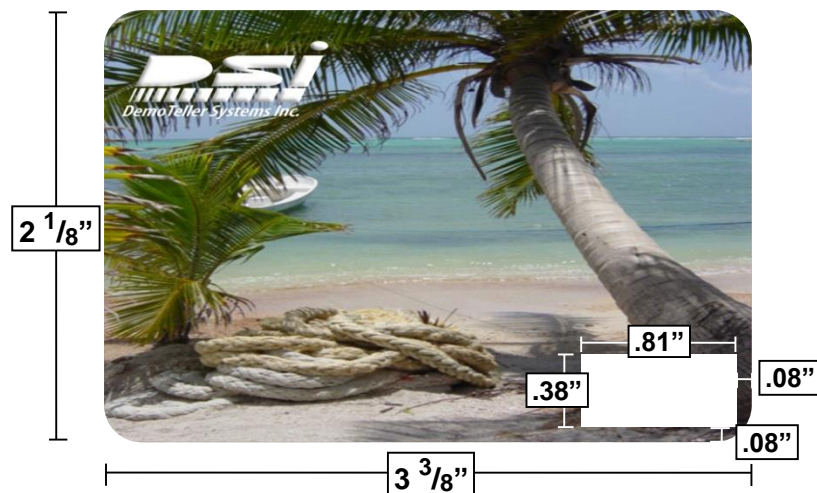
Card size	3 ³ / ₈ x 2 ¹ / ₈ "
Bleed	¹ / ₈ " optimal; ³ / ₃₂ " minimum
Clearance	Text/logos at least ³ / ₃₂ " from edge of card, brand marks, magnetic stripe, EMV chip, or signature panel

VISA® Specifications

VISA® brand mark	.38" x .81"
Distance from right of brand mark to right edge of card	.08"
Distance from bottom of brand mark to bottom edge of card	.08"

Custom Images

Image file type	.jpeg
Aspect Ratio	3:2



Permission Descriptions

Locked: Disables user from logging in to TRISM

Add Printer: Add printers to branches

Edit Printer: Edit printers

Delete Printer: Delete a printer in branch

Security

Template Security Level: Determines for whom the user may reset passwords. Users may reset passwords for users with security levels lower than their own.

Edit Security Template: Add templates

Edit Security Permissions: Edit templates

View All Branches: Displays the queue of all branches

Order Cards

View Order Card: Displays the Order Card tab in the main TRISM menu

View Actions: Shows Request dropdown menu

Edit Permissions: Shows Edit Permissions in the Request menu

With PIN Verification: Show RePIN option in the Request dropdown menu

Override: Show RePIN option in the Request dropdown menu

Order Card Express: Open the Order Card window upon login

PIN Mailer Only: Shows PIN Mailer in Request meun

Queue

View Queue: Displays the Queue tab in the main TRISM menu

Edit Card: Edit cards in queue

Delete Cards: Allows card deletion in the Queue

Delete from any Branch: Allows card in queue to be deleted from any branch

Purge Queue Requests: Shows Purge Queue Requests button

Reports

View Reports: Show Report dropdown in main TRISM menu

View Local Reports: Allows access to Management in the Reports dropdown menu

Run End of Day Reports: Allows Process End of Day button

Run End of Day Reports - User: Allows Show End of Day report dropdown menu

Run End of Day Reports - Admin: Allows Show End of Day report dropdown menu

Show Masked Card Number: Masks card numbers

View Non-Financial Reports: Allows non-financial report to display under
Management Reports

View Individual Reports: Show saved Management reports

View Existing Reports: Show Historical card balancing in Reports dropdown menu

Inventory

View Inventory: Displays the Inventory tab in the main TRISM menu

Device Unlock: Allows access to Device Access in the Inventory dropdown menu

View Card Stock: Allows access to Card Stock in Inventory dropdown menu

View Vault Inventory: Allows access to Card Stock in Inventory dropdown menu

Central View: Shows Central Inventory transfer

Central Admin: Allows adding Central vaults and sending cards

Central User: Shows options for Main Vault on right click

Branch View: Shows Branch Inventory transfer

Branch Admin: Allows adding a branch

Branch User: Shows options for Branch on right click

Configure

View Settings: Displays the Configure tab in the main TRISM menu

User Editing: Shows Users in Configure menu

Add User: Show "Add User" button

Edit User: Show "Edit User" button

Delete User: Show "Delete User" button

Format Add: Show "Add" and "Copy" Format buttons

Format Edit: Show "Edit Format" button

Format Delete: Show "Delete Format" button

Card Stock: Allows manipulation of card stock

Add: Add card stock

Delete: Delete card stock

Edit: Edit card stock

Rename: Rename card stock

General Edit: Shows General in Configure menu

User Editing: Shows Users in Configure menu

Template Editing: Shows Templates in Configure menu

Format Editing: Shows Formats in Configure menu

Device Editing: Shows Devices in Configure menu

Active Directory Edit: Shows Active Directory in Configure menu